

Adults Quick Guide

Wellbeing Service – Generic Support Officers

The Wellbeing workflow always starts with a workflow step called **WB Wellbeing Screening**.

The **WB Wellbeing Screening** step is recorded by any worker who wants to screen to see if a person is eligible for the Wellbeing Service. This can be completed by the Wellbeing Service Hub Team workers for referrals received directly. It can also be completed by other (external) workers, such as LCC Adult Care practitioners and CSC.

For people who are screened as eligible for the Wellbeing Service, the Wellbeing Service Hub Team worker will complete the **WB Initial Risk Assessment and Triage** step.

The Trusted Assessor (TA) will then complete the **WB Trusted Assessment and Support Planning** step and the Senior Officer (SO) will assign the **WB Support Action Plan Delivery** step to a Generic Support Officer (GSO).

To start a case

Once the case has been allocated by the SO, the **WB Support Action Plan Delivery** step will appear in your **Incoming work** folder

If reassigned to you (this is sometimes left assigned to the team inbox) - you will also have the **WB Case Monitoring** step in your **Incomplete work**.

This step remains **open** throughout a person's involvement with the Wellbeing Service. It should be completed with relevant activity by each worker. It will therefore be started prior to your involvement.

From your **Incoming work** folder click the **person's name** to access the record – this will allow you to check for warnings and other useful information before contacting the person

Worker and Organisational Relationships

The relevant **Wellbeing Service Team (North or South)** should have been recorded as an **Organisational relationship** of 'Involved Team' by the Wellbeing Service Hub worker.

If this has not been recorded you should add this to the record using the **Person details > Organisational relationships** extended sidebar menu

Refer to the **Organisational Relationships** user guide for full details on how to do this.

When allocating the case the SO should also have recorded a **Worker relationship** of 'Involved Worker' for you.


If this has not been recorded you should add this to the record using the **Person details > Worker relationships** extended sidebar menu

Refer to the **Worker Relationships** user guide for full details on how to do this.

The team and worker will both display within **Professional and organisational relationships** on the **Person summary** screen.

Updating a Person's Details

Throughout a person's involvement with the Wellbeing Service their personal details should be reviewed and updated – this can be completed by any worker at all stages of the process (usually after you have contacted and/or visited the person).


You will be prompted to review and update some details within the Wellbeing workflow steps – fields with a **blue cog**  symbol display within section 1 of each workflow step. These fields can be updated as per the guidance in [General tips for completing workflow steps](#)

Some of the other details you should always review and record/update are:


- **Employment Status** – recorded via **Person details > Employment status** in the extended sidebar menu – refer to the **Employment Status** user guide for full details
- **Current Communication Needs** – recorded to comply with the Accessible Information Standard. Recorded via **Current communication needs** on the Person summary screen – refer to the **Current Communication Needs** user guide for full details



- **Health Conditions** – recorded via **Health > Conditions / Disabilities** in the sidebar menu – refer to the **Health Conditions** user guide for full details
- **Notes** – recorded to display warning messages or general information on the Person summary screen. recorded via **Person details > Notes** in the extended sidebar menu – refer to the **Notes** user guide for full details
- **Personal and Professional Relationships** – recorded via **Person details> GP / Organisational relationships / Personal relationships / Worker relationships** in the extended sidebar menu – refer to the relevant user guides in the **Relationships** section of the User Guides page for full details


General tips for completing workflow steps


Clicking on the **Show guidance** icon  will give you additional information to assist in answering the associated question.


Clicking the **Section completed** checkbox at the end of each section puts a tick in the sections menu on the left. This will show you which sections you have completed and if you have missed anything, but will not lock the section down nor save the section or form. There is also an option to select 'completed section only' when printing forms.

Click the **Save** icon  throughout your recording in the form. It is recommended that you save your work at least at the end of each section, but the more often the better. Once you click save, any mandatory fields will be highlighted in red.

Fields marked with the **yellow cog**  symbol will prepopulate but can be edited within the form where required. For best practice, wherever possible, these should be treated as a **blue cog** .

Fields with a **blue cog**  are prepopulated from the person's record and cannot be edited within the form. To correct information or add missing information:

- Click the **Show subject summary** icon  to minimise the workflow step window
- Edit the information on the **Person summary** screen (refer to the relevant user guides on the **Mosaic Hub** to assist you in updating information)

- Maximise the workflow step window and then click the **Refresh current form** icon  to update the prepopulated information.

Next actions section

The **Next actions** section is always the last section of a form and is where next actions are recorded. At least one next action must be recorded before a workflow step can be finished.

Next actions are how we show what will happen next and who will do it.


You will be prompted to add certain actions based on the answers to the questions within the form.


To record a next action:


- Click the **Add** button
- Select the relevant action from the '**Select action**' dropdown menu
- Tick the '**Send Immediately?**' checkbox where necessary (only available for certain actions)
- Where necessary check and amend the scheduled date (only available for certain actions)
- Assign to = Select/Find as appropriate - Not required for NFA (no further action) actions
- Reason = select an appropriate reason (only available for certain actions)
- Note = record any necessary information – recommended when assigning a next action to another team/worker
- Priority = select radio button as appropriate – use the 'Note' field to explain why you have changed the 'Priority' from 'Normal' if you change it
- Click the **Add** button if more than one next action is required or click the **Add and close** button if only adding one next action or once all actions are added


Toolbar Icons

Before finishing your workflow step you should always consider whether you need to use any of the other toolbar icons at the top of the screen.

The **Output current document** icon  can be used at any stage, including prior to going out to visit the person, to generate a PDF of the support action plan. This PDF can be saved to your computer, emailed or printed as required. Depending on your reason for generating the PDF you will need to amend the 'Output Options'. See the **Printing Documents** user guide for full details.


You should use the **View documents** icon  to attach relevant supporting documents created outside of Mosaic for example photos or plans needed for SADL. See the **Uploading Documents** user guide for full details.


The **Forms and letters** icon  should be used to open and use additional forms – you are usually prompted to use these based on the answered recorded within the main form.

The **Requests** icon  contains requests and/or notifications that you can send to a team or named worker.

- **Requests** require a response – you will not be able to finish the workflow step until the team/worker responds and completes the request.
- **Notifications** are purely for information – you will be able to finish the workflow step without a response.

Refer to the **Requests and Notifications** user guide for details on how to send a request or notification.

Clicking the **Finish** icon  will finish (lock down) your workflow step. Workflow steps cannot be finished if there are any incomplete mandatory fields or if there are any requests which need completing.

Once the **Finish** icon  can be clicked no further input can be made and the next action(s) will send, appearing as new 'Incoming work' to be completed.

You will find all finished forms completed within your steps in the **Documents** section. Only finished versions of the forms should be shared. A PDF version of your finished form should therefore be generated from the **Documents** section. For further guidance, please refer to the **Printing Documents** user guide.



WB Support Action Plan Delivery


To start the **WB Support Action Plan Delivery** step, from within the person's record:

- Click the **Incoming work** icon  within **Current work** on the **Person summary** screen
- Click **Start work** from the menu

The **WB Support Action Plan Delivery** will open in a separate window

Section 1. Personal Details

Remember - Fields with the **blue cog**  are prepopulated. As per the guidance in [General tips for completing workflow steps](#), they are updated using the **Show subject summary**  and

Refresh current form  icons – you do not have to exit the workflow step to record this information.

Sections 2 - 11

The information in sections 2 – 11 pulls through from the **WB Trusted Assessment and Support Planning** step and cannot be edited.

The information should be used to aid you in supporting the person and for best practice we suggest you check the 'section completed' checkbox on each section as you read it.

Section 12. Support Action Plan Delivery

This section is used to record the start date of the support and details of the support you provide to the person

The domains displayed in this section are the areas of need identified by the TA.

For each domain in this section you will need to click the **Edit Pencil** icon 


A popup window opens and you will have to record the following:-

- Support provided
- Date
- If outcome not achieved, why not?
- Exit score

To save the information you have added click the **Save changes** button and the popup window will close.

You should update each domain as and when support is provided – this is not always going to be completed on the same day and should not just be left until the end of your involvement.

Important notes:


- The **Add** button will appear under each domain but should not be used in this step as you should not be adding additional needs.
- If multiple rows have been recorded within a domain (because the TA listed more than one need for that domain) you should use the **Edit Pencil** icon  for each row to record the information as described above, but **only one 'Exit score'** is required per domain. **The 'Exit score' is for the whole domain and should be recorded against the first row (the row with the 'Entry score')**.

Section 13. Completion Details

This section is used to record the end date of the support, details of any other agencies the person has been referred to and any additional needs that have been identified.


Section 14. Next actions

The following next actions are available from the **WB Support Action Plan Delivery** step:



| Action | When to use | Who to assign to |
|--|--|---|
| <p>WB Transfer to Wellbeing Service Hub Team for Reassessment</p> <p>It will appear as WB Initial Risk Assessment and Triage in Current work.</p> | <p>If you identify additional needs</p> | <p>Wellbeing Service Hub Team using the 'Pass to team' dropdown menu.</p> |
| <p>WB Referral to SADL</p> | <p>When a referral for simple aids for daily living (equipment) is required.</p> <p>The optional form WB SADL Referral (available via Forms and letters icon ) must be completed before adding this action.</p> | <p>Wellbeing SADL Service using the 'Pass to team' dropdown menu.</p> <p>This action should be 'sent immediately'</p> |
| <p>WB Referral to Other Agency (NFA)</p> | <p>If you have referred the person to other agencies.</p> | <p>This is a 'no further action' (NFA) action and so does not need assigning</p> |
| <p>WB Telecare Referral (NFA)</p> | <p>When telecare equipment is required. This is arranged outside of Mosaic.</p> <p>A mandatory reason must be recorded to select the provider.</p> | <p>This is a 'no further action' (NFA) action and so does not need assigning</p> |
| <p>WB Involvement Ended (NFA)</p> | <p>When the Wellbeing Service involvement is ending but the case is remaining open to other workers/teams/services.</p> | <p>This is a 'no further action' (NFA) action and so does not need assigning</p> |
| <p>Adult Proposed Case Closure</p> | <p>When the Wellbeing Service involvement is ending and the case needs fully closing down as there are no other open workers/teams/services.</p> | <p>Self using the 'Assign to Me' button</p> |

| Action | When to use | Who to assign to |
|--|--|---|
| Adult Case Closure Already Started (NFA) | <p>When the Wellbeing Service involvement is ending and the case needs fully closing down as there are no other open workers/teams/services but someone else has already started this process.</p> <p>To record this action you should be able to see Adult Proposed Case Closure or Adult Case Closure in Progress in Current work.</p> | This is a 'no further action' (NFA) action and so does not need assigning |

Remember before finishing the step you should consider the toolbar icons.


The following requests and notifications are available from the **Requests** icon 

| Request (R) / Notification (N) | When to use | Who to assign to |
|---|---|---|
| (R) REQUIRED WB Transfer to Senior Officer to review information and add additional next actions | Mandatory for all cases - to allow the Senior Officer to sign off the work and record/update necessary next actions. | Wellbeing Service Management Team using the 'Pass to team' dropdown menu |
| (N) WB Hub please send relevant correspondence | To request the Wellbeing Service Hub Team workers send out correspondence. You should record what you need to be sent out using the 'Note' field. | Wellbeing Service Hub Team using the 'Pass to team' dropdown menu |
| (R) WB Please action | As and when required – standard request found in all Wellbeing workflow steps | As appropriate using 'Pass to team' dropdown menu or 'Pass to worker > Find button' |

Once you have sent the mandatory request exit the step using the **Close** icon  – the Senior Officer will click the **Finish** icon  when they sign off the step.

WB Case Monitoring

To resume the **WB Case Monitoring** step, from within the person's record:

- Click the **Incomplete work** icon  within **Current work** on the **Person summary** screen
- Click **Resume work** from the menu



The **WB Case Monitoring** will open in a separate window


The **WB Case Monitoring** step should remain **open** throughout a person's involvement with the Wellbeing Service.

It should be completed with relevant activity (telephone calls, emails, meetings etc) by each worker.

It will therefore be started prior to your (the Generic Support Officer's) involvement and will show as Incomplete work, not Incoming work.

Section 1. Personal Details

Remember - Fields with the **blue cog**  are prepopulated. As per the guidance in [General tips for completing workflow steps](#), they are updated using the **Show subject summary**  and

Refresh current form  icons – you do not have to exit the workflow step to record this information.

Section 2. Case Monitoring Activity

Activity should be logged in this section using the **Add** button.

An Activity popup window will open and you will have to record the following:-

- Date/Time
- Activity and actions required
- Worker recording activity – default in with your name


If recording multiple lines of activity click the **Add** button – this will add the activity and refresh the screen so you can record the next line.

If recording just one line of activity or once all activity has been recorded, click the **Add and close** button – this will close the popup window and display the activity table.

Once activity has been recorded the following icons are displayed:

 **Edit** – to edit/amend a line of activity

 **Delete** – to delete/remove a line of activity

 **Move this row up** – to rearrange the order of the activity logged (only displays if more than one activity is recorded)

Section 3. Completion Details

At the bottom of this section there is a mandatory field '**Reason for Wellbeing involvement ending**'. This must only be recorded by the worker involved with the case at the point of the Wellbeing Service activity ending.

Section 4. Next actions


The relevant next action must also be recorded at the end of Wellbeing Service activity.

The following next actions are available:

| Action | When to use | Who to assign to |
|---|---|---|
| WB Case Monitoring Complete (NFA) | Once all case monitoring activity has been recorded and the Wellbeing involvement has ended. | This is a 'no further action' (NFA) action and so does not need assigning |
| WB Case Monitoring No Longer Required (NFA) | If case monitoring is no longer required e.g. for cases not progressing beyond the Initial Risk Assessment. | This is a 'no further action' (NFA) action and so does not need assigning |
| Adult Proposed Case Closure | When the Wellbeing Service involvement is ending and the case needs fulling closing down as there are no other open workers/teams/services. | Self using the ' Assign to Me ' button |

| Action | When to use | Who to assign to |
|--|--|---|
| Adult Case Closure Already Started (NFA) | <p>When the Wellbeing Service involvement is ending and the case needs fulling closing down as there are no other open workers/teams/services but someone else has already started this process.</p> <p>To record this action you should be able to see Adult Proposed Case Closure or Adult Case Closure in Progress in Current work.</p> | This is a 'no further action' (NFA) action and so does not need assigning |

Remember before finishing the step you should consider the toolbar icons.

The following requests and notifications are available from the **Requests** icon :


| Request (R) / Notification (N) | When to use | Who to assign to |
|--|---|---|
| (N) WB Hub please send relevant correspondence | To request the Wellbeing Service Hub Team workers send out correspondence. You should record what you need to be sent out using the 'Note' field. | Wellbeing Service Hub Team using the 'Pass to team' dropdown menu |
| (R) WB Please action | As and when required – standard request found in all Wellbeing workflow steps | As appropriate using 'Pass to Team' dropdown menu or 'Pass to worker > Find button' |

The step should be finished using the **Finish** icon  by the worker completing the step.


End Worker Relationship and Organisational Relationship

Once your involvement is complete and your activity has ended, your **Worker relationship** must also be ended.

- Click **Person details > Worker relationships** in the extended sidebar menu

- Click the **Edit Pencil** icon  by the **Generic Support Officer**
- To = record relevant 'end' date
- End Reason = select relevant reason from dropdown menu
- Click the **Save** button then click the **OK** button to return to the Person summary screen – your worker relationship will disappear from **Professional and organisational relationships** straight away and the your allocation will also disappear.


The **Organisational relationship** for the Wellbeing Service North/Wellbeing Service South will also need ending.

- Click **Person details > Organisational relationships** in the extended sidebar menu
- Click the **Edit Pencil** icon  by the **Wellbeing Service North/South Team**
- To = record relevant 'end' date
- End Reason = select relevant reason from dropdown menu
- Click the **Save** button then click the **OK** button to return to the Person summary screen - the team will display within **Professional and organisational relationships** until midnight of the end (To) date.

Start Sidebar Menu

The **Start > New...** sidebar menu shows the list of workflow steps available to Wellbeing workers, these are as follows:

- **Adult Proposed Case Closure** – completed to initiate a full case closure. Please see [Full Case Closures section](#)
- **WB Covid – 19 Response** - used for Covid - 19 referrals
- **WB Wellbeing Screening** – completed to record Wellbeing referrals received directly into the Wellbeing Service Hub Team

Important note: A new workflow map is created each time a workflow step is started from the Start sidebar menu. When viewing the **Workflow Map** it is therefore important to click on the **View Workflows** icon  within the Workflow Map to see all case activity.

For further guidance please refer to the **Workflow Map** user guide.

Referring to Safeguarding or Carers Services

Referring to Safeguarding

If you identify any safeguarding issues, you should discuss these with your manager or safeguarding officer. If they are in agreement, telephone the Customer Service Centre (CSC) to raise a Safeguarding Concern.

Following a Safeguarding referral to CSC you would expect to see an **Adult Safeguarding Triage** step in Current work on the Person summary screen.

Referring to Carers Services

If you identify the need to refer the person or their carer to Carers Services you should telephone the Customer Service Centre.

Following a Carers referral to CSC you would expect see an **Adult Carer Triage** step in Current work on the Person summary screen of the carer's record.

Full Case Closures

Sometimes there will be the need to propose a full case closure i.e. the record needs to be closed because the person has died, left the area or does not have any social care needs and is not open to any other team or service.

For **full case closures only** – the next action **Adult Proposed Case Closure** should be assigned to self for completion.

The **Adult Proposed Case Closure** step is also available from the **Start > New...** sidebar menu if needed – it is not expected that you start a workflow step just to select the next action 'Adult Proposed Case Closure'.

From the **Adult Proposed Case Closure** step a next action of **Adult Case Closure in Progress** should then be assigned to the relevant Adult Admin Team (LCC Business Support Team) based on where the person lives.

If the person has died or left the area and was previously in receipt of a direct payment service (you can find this information within **Care packages provided** on the Person summary screen), you will need to send the '**Adult Please review information and authorise**' request to the relevant LCC Adult Care (Area) Team.

The Adult Care Team will then complete the Direct Payments Suspension and Termination checklist section, review the case and finish the Proposed Case Closure step

Please refer to the **Case Closures – Full, Team and Involvement** user guide for full guidance.